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## Overview

This standard identifies the competences you need to transfer control of engineering products, processes or facilities, in accordance with approved procedures. This will include communicating with all personnel involved with or affected by the change of control.

Your responsibilities will require you to comply with organisational policy and procedures for ensuring the successful transfer of control of engineering products, processes or facilities, and to report any problems that you cannot personally resolve to the relevant authority. You will be expected to work unsupervised, either on your own or as part of a team, which you may lead or direct, taking full responsibility for your actions, and possibly for the work of colleagues or subordinates.

Your underpinning knowledge will provide a good understanding of general and discipline-specific engineering principles and processes. You will also be fully conversant with organisational procedures and systems, and will know about the specifications, details and formats, in adequate depth to provide a sound basis for carrying out the activities to the required standard.

You will be fully aware of any health, safety and environmental requirements, and the appropriate legislative and regulatory frameworks applicable to your area of responsibility. You will be required to ensure that safe working practices are maintained throughout, and will understand the responsibility you owe to yourself and others in the workplace.

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## Performance criteria

### *You must be able to:*

1. work safely at all times, complying with health and safety and other relevant regulations, directives and guidelines
2. confirm the procedures for transferring control of the engineering product or process
3. ensure that the engineering product or process is ready for transfer and complies with all relevant specifications and requirements
4. provide clear and accurate information to the relevant personnel on the engineering product or process
5. identify and explain any aspects of the engineering product or process that vary from the agreed specifications and requirements
6. obtain acceptance of the engineering product or process according to the agreed transfer procedures
7. ensure that all relevant documentation is correctly completed and recorded in the appropriate information systems

## Knowledge and understanding

### *You need to know and understand:*

1. the health, safety and environmental requirements applicable to the control transferring activities, and how they apply to the product, process or facility being transferred
2. the relevant regulations, directives and guidelines applicable to transferring of control of engineering processes
3. how to obtain information on regulations, directives and guidelines
4. how to define the key factors for the product, process or facility that might be affected by the transfer of control
5. how to liaise with customers to determine their requirements for transferring control
6. who to communicate with customers regarding the transfer of control
7. the procedures for transferring control for products, processes or facilities
8. techniques for assessing and dealing with aspects of the products, processes or facility, that may not comply with specifications or requirements
9. the specifications and expected outcomes from the engineering products, processes or facility, and how to evaluate whether these are being achieved at the time of the transfer of control
10. the organisational systems for recording information
11. the importance of using company information systems
12. the various and most appropriate ways of achieving acceptance of the process from the receiving person or organisation
13. the extent of your own responsibility and to whom you should report if you have problems that you cannot resolve

## Scope/range related to performance criteria

1.

Carry out **all** of the following during the transfer of control:

- 1.1 identify the specifications and requirements that apply
- 1.2 identify the personnel involved, and ensure that they have the appropriate information
- 1.3 plan the transfer of control to minimise disruption to normal working
- 1.4 prepare the products, processes or facilities for transfer
- 1.5 transfer control, in accordance with the appropriate procedures
- 1.6 verify that the transfer has been successful, and that the products, processes or facilities meet the requirements of the customer
- 1.7 confirm that all relevant specifications, regulations, directives and guidelines have been complied with
- 1.8 document and communicate the appropriate information to all relevant personnel

2.

Determine **all** of the following requirements for transferring control:

- 2.1 the product, process or facility description
- 2.2 the personnel from whom control is being transferred
- 2.3 any specific requirements
- 2.4 the personnel to whom control is to be transferred

3.

Establish plans to transfer control that includes **two** of the following:

- 3.1 timing plan
- 3.2 preparation of product, process or facility
- 3.3 identification of authorisation channels
- 3.4 testing and/or trials
- 3.5 safety and environmental requirements
- 3.6 handover

4.

Ensure that the transfer of control complies with **three** of the following:

- 4.1 organisational guidelines and procedures
- 4.2 recognised compliance agency/body's standards, directives or codes of practice
- 4.3 equipment manufacturer's operating specification/range
- 4.4 customer standards and requirements
- 4.5 health, safety and environmental requirements
- 4.6 British, European or International standards or directives

5.

Carry out **one** of the following actions during a transfer of control:

- 5.1 change the specification

5.2 seek authority to proceed without compliance with the specification

5.3 change the product or process

6.

Transfer control and obtain acceptance for **all** of the following:

6.1 confirmation of the agreed specification and procedures

6.2 confirmation that products, processes or facilities comply with specifications and requirements

6.3 details of any variation from, or non-compliance with, the agreed specifications and requirements

7.

Record and communicate the transfer of control to the appropriate people, using:

7.1 a verbal report

plus **one** from the following:

2. electronic mail

3. computer-based presentation

4. computer generated report

5. specific company document

6. other appropriate media

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## Behaviours

# Additional Information

You will be able to apply the appropriate behaviours required in the workplace to meet the job profile and overall company objectives, such as:

- strong work ethic
- positive attitude
- team player
- dependability
- responsibility
- honesty
- integrity
- motivation
- commitment

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Transfer control of engineering products, processes or facilities



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